

A black and white photograph showing a group of people in a meeting. The scene is viewed from above, focusing on a wooden table. In the foreground, a silver laptop is open, with a hand pointing at the trackpad. To the left, another hand holds a pen over an open notebook. In the center, a stack of papers and a coffee cup are visible. The background shows more hands and papers, suggesting a collaborative work environment.

HRMD U – Coaching!

Get ahead of the game!

What is Coaching?



The coaching approach to being a manager often looks at employee conflict or challenges as an **opportunity** for the manager and employee to learn how to improve their relationship. Coaches look at the core issues that can be causing a problem and work with the employee to help resolve those issues.

<https://smallbusiness.chron.com/discipline-vs-coaching-workplace-17616.html>

When should you use coaching?

- ❖ During regular feedback to your employee. Coaching can be an ongoing process where you build up and mentor your employee.
- ❖ As the first step in addressing performance or behavioral concerns. Coaching informs the employee of potential issues or concerns and provides the opportunity to correct issues before they become an issue.
- ❖ When a new process or policy is implemented to ensure that the employees know what is expected of them.

What is so important about Coaching?

- Not only does the Coaching set a precedent; but it also serves as the first documentation in addressing your concerns with your employee.
- Coaching can also remain informal and does not require the start of further disciplinary action. However, if the initial, informal coaching doesn't receive the desired results, you have the documentation that allows you to proceed into additional training or disciplinary action.
- Remind the employee that this is an opportunity to make necessary improvements and that, if improvement doesn't happen, you may have to resort to the progressive disciplinary process.
- Be tactful in the delivery of your Coaching. Recognize your employee when appropriate. This will help you build rapport and assist you in aligning mutual goals.

The Three-Step Coaching Process:

- **Step One:**

Speak with the employee to introduce the area you've chosen to coach.

- Be able to recognize positive aspects in your employee's performance
- Use neutral, factual verbiage to tie the coaching into business need and employee success

- **Step Two:**

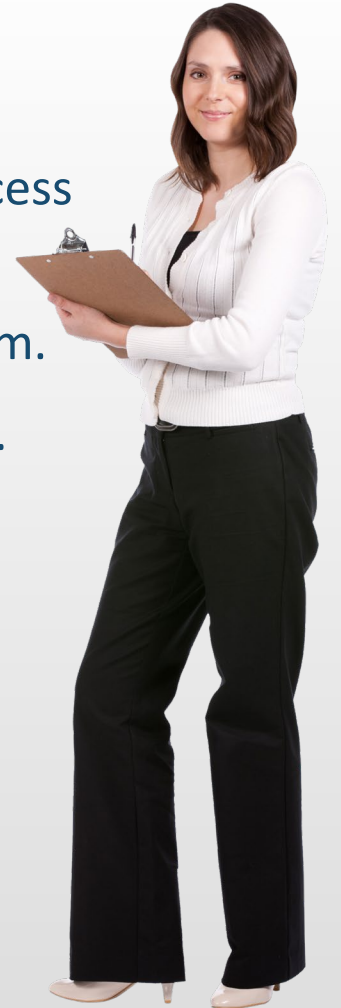
Ask the employee what they think they could do to improve performance, solve the problem.

- Ask specific questions, suggest alternative approaches and work together for solutions.
- "What can you tell me about this [issue]?"

- **Step Three:**

Agree to any action(s) to be taken, and when you will follow up on them.

- "Can I get commitment to correct this issue?"
- Be sure to recognize effort, progress and achievement. Document the agreement in a memo or email to the employee. Repeat step two and three if necessary.





The Three-Step Coaching Process In Practice:

Best coaching conversation

(1:43 minutes)



"Great managers know great performance comes from frequent, meaningful conversations with their workers. They can't abide 'management by remote control.' They know what to talk about because they know their people well, which sparks the conversations that improve performance and build genuine relationships."

<https://www.gallup.com/workplace/282647/give-bossing-coaching-results.aspx>

How to address concerns...

- ***Document your Coaching***

- Informally, for initial coaching sessions or regular one-on-ones: send a follow up email or memo to the employee thanking them for meeting with you and confirming the discussed topics and any agreements made.
- Formally, for corrective/preventative actions: Coaching Form Available at <http://traviscentral/hr/at-work/forms>
- This documentation will help facilitate and serve as ***a record of collaboration efforts between employee and manager***. This is done in order to establish a concrete groundwork of set expectations as well as performance requirements.
- *Please note that this form should be visited well prior to conducting a Performance Improvement Plan.*

What to include in the Coaching Memo?

- **Summarize** the coaching session. List the points and agreements made.
 - This doesn't need to be a word for word replay or transcription. Keep it short and focused.
- Send via email to your employee. This provides date and time tracking for the coaching.
 - If a paper memo is provided, make sure the date and time of the coaching is listed and that you keep a copy for your records.
- Remind the employee that a lack of improvement will lead to additional action through the disciplinary process.
- Ask the employee to reply that the message was received and to respond with any corrections or additions to the summary.

Sample Coaching Memo - Performance

Thank you for meeting with me today to discuss your widget production numbers. As we discussed, the expectation is 25 per day and you've been averaging 20 every day.

We agreed on 2 days of retraining on the production process and scheduled for that to happen next week, Monday and Tuesday, with Burt. You also mentioned that you had some issues with your tools so we will take a look at your widget adjuster to see if it needs repair or replacement.

With these actions, we should see improvement in your production numbers to get you to the expected number. We will follow up with you and will rely on you to let us know if there are other issues preventing you from meeting your numbers. If we see that your production isn't improving, we may have to follow up with you through the disciplinary action process.

Please let me know that you received this email and that I captured what we discussed today. If there's something that you think needs to be corrected or added, please respond so I can adjust.

Sample Coaching Memo – Behavior

Thank you for meeting with me today to go over my concerns about your communication with your teammates. It's critical that communication is cordial and productive to ensure that we're able to work together to meet customer needs. You agreed that there have been times when your communication wasn't completely appropriate.

You've agreed to pay more attention to your tone and to refrain from using inappropriate language, even when not directly speaking with a co-worker. You also said that you are going to take a pause if you're feeling frustrated to center your thoughts.

I've provided details on the EAP that is available to you and encourage you to contact them for additional support.

Please let me know that you received this email and that I captured what we discussed today. If there's something that you think needs to be corrected or added, please respond so I can adjust. If we do not see an improvement in your communication with your team, we may have to address it in future progressive disciplinary action steps.

What to include in the formal Coaching Form?

- Found On Travis Central
- Topics discussed should include, but are not limited to:
 - *Areas of improvement (with examples) of performance or behavioral issues*
 - *Expected standards needing to be met for the role*
 - *Date of expected improvement*
 - *Formal follow-up dates with their supervisor*
 - *Training Assigned, which should be directly related to improvement areas*
 - *Manual or digital (e-mail) record agreement of understanding*
 - *Follow up notes for post coaching session*
- The employee signature is to acknowledge the meeting and not signifying agreement or guilt. Their comments can include their statement of disagreement.
- It is imperative to communicate that if performance requirements are not met by the end of the **Coaching Form period**, a disciplinary process may be initiated.

Coaching Form Sample (Top):

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**TRAVIS COUNTY
PERFORMANCE PLANNING, MANAGEMENT AND MEASUREMENT SYSTEM**

Employee Coaching Form

Name: Boo-Boo	Job Title: Park Ranger	
Department: TNR	Supervisor Name: Yogi the Bear	Title: Park Ranger Super
Performance Plan Date: 1/27/2020	Time: 12:30PM	Location: Hanna-Barbera HQ

This Coaching Form should not be considered a disciplinary action, but an opportunity for increased understanding of performance and behavior expectations between the employee and department allowing the employee to meet and exceed individual goals and job expectations in the following areas:

Targeted Improvement Areas:	Expectation:	Due Date:
Punctuality	Ensure you arrive to the our worksite on time, as we need to begin patrol at 8:00AM	1/27/2020

Coaching Form Sample (Bottom):

- We have formal follow up and review sessions on, but are not limited to, these dates to review progress in the targeted improvement areas: 02/17/2020, 03/16/2020, [REDACTED], [REDACTED].

Training Assigned:	Mode: (LMS, In Person, Etc.)	Due Date:
Time Management Training	In Person	02/14/2020
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]


If the necessary improvement is not obtained or sustained, further training and/or disciplinary action may be taken.

Coaching Form Pg. 2 (Top):

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Additional Supervisor Comments:


Thank you for your hard work with the Park Clean-Up event. Your stewardship with the project is greatly appreciated!

Supervisor Signature: 

Date: 01/27/2020

Employee Comments:

I love working here, but you can be a bit stingy with the honey jar Yogi.

Employee Signature: 

Date: 01/27/2020

If the employee refuses to sign, have a witness sign to verify that the document was reviewed with the employee and that a copy was given to the employee.

Witness Signature: 

Date: 01/27/2020

Coaching Form Pg. 2 (bottom) & Pg. 3:

Supervisor Follow-Up Notes:

Comment	Date
None at this time.	

Recommend Performance Improvement Plan: Yes No Date: 1/27/2020



Follow up!

- Check for progress and improvement.
- Continue to encourage your employee.
- Provide regular, timely and appropriate feedback.
- DOCUMENT, DOCUMENT, DOCUMENT!!

Didn't send a follow up email?

- Always keep your own notes on the coaching that you do with your employees.
 - Maintain objectivity even in your own personal notes. These are discoverable too.
- The most important thing is to have some record of what you did and when.
- You can always send a follow up email even if it's a day or two later.



What options do I have to further address job performance issues?

- Persistent Performance and/or Behavior issues may lead to further formal disciplinary actions to include verbal or written reprimands, Performance Improvement Plans (PIP) or Pre-Deprivation Hearings, if appropriate.
- Timeliness of follow-up on continued issues is critical. Coaching sets the stage.

